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ABSTRACT

As a part of the initial phase of a strategic planning effort for the development of Florida's 1988 through 1991 long-range cooperative extension program, an effort was initiated to achieve common expectations for overall organizational mission and purpose among diverse cooperative extension faculty. The unification effort included the following five phases: a state conference focusing on environmental scanning and the extension's organizational mission and capabilities, program area conferences focusing on state and national trends and issues related to the program area, district conferences with all county faculty reviewing county situational analysis and problems identified, regional work sessions to design programs and develop plans of work through agent/specialist design teams, and development of promotional strategies for county and state programs. The 510 persons who attended the statewide conference were organized into 20 different working groups of about 25 persons per group. A followup questionnaire mailed out about a month after the conference indicated that the majority of both the county and state extension faculty who attended had approached the task with diverse and often conflicting interests. After working through the group process, however, they began to reach a common understanding of the extension service's mission and purpose. All four of Kotler's predicted organizational responses to change (denial, opposition, modification, and relocation) could be seen as the groups worked through the tasks assigned them. Feedback obtained after the conference indicated that the majority of participants left it with a renewed sense of purpose and with a desire to move to the subsequent phases of the state planning effort. (MN)

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ACHIEVING COMMON EXPECTATIONS FOR OVERALL GOALS
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Introduction and Situational Analysis

As many states are currently engaged in the development of long range Extension programs, administrators are viewing the Extension organization against a backdrop of changing client needs and threatened reductions in funding at all levels to meet these needs. This is an especially relevant time for any state to examine the structure and activities of its Extension organization and consider the degree to which it is appropriate to its ever-changing constituents (Dillman, 1985). This paper focuses on one state's effort to achieve a common understanding among its diverse state and county Extension faculty of Extension's mission and purpose, potential audiences to be served, and organizational capabilities.

Organizational survival today is more than a matter of being efficient, it is a matter of being adaptive. Managing to do the appropriate things in a changing environment in which new client needs appear, new competition emerges, social values change, new laws are passed, and radically different technostructures appear is critical to the life of the organization (Kotler, 1982). This requires an organization to align its mission, objectives; and organizational capabilities with its opportunities.

In their recent best seller on organizational excellence in America's best run corporations, Peter and Waterman (1982) identified several factors that contribute to organizational effectiveness. They found that companies which successfully adapted to changing clientele demands, acquired and diversified in manageable steps to insure that the new strengths meshed with the existing core strengths of the company. Cooperative Extension has also been an organization that has prided itself on being responsive to changing clientele needs. And as in successful business, it has diversified and acquired new strengths that have been added to existing ones. Over the years, the original program areas of agriculture and home economics have been expanded to include the areas of youth development, marine, community development, and energy and environmental resources.

However, in the process of expanding program areas to meet more complex needs of constituents, there has been a tendency for Cooperative Extension to become more specialized. Extension faculty within a program area have tended to perceive theirs as a discrete program area working in isolation from other program areas and to have little awareness of the educational activity or total organizational mission.

This expanding specialization has led some to say we have left our original mission and we are trying to be all things to all people. The President's 1986 federal budget proposal raised serious questions regarding

purpose and mission by proposing that the needs of agricultural producers be given first priority for programs. Various boards and policy committees have raised similar questions regarding mission and purpose and pointed out the need to redirect programs or eliminate programs to be more responsive to needs of specific groups of constituents. Extension faculty themselves have become puzzled about questions relating to what we should be doing to meet clientele needs, which clientele we should be addressing, and capabilities of the organization to address the complex needs of our rapidly changing population.

In a national assessment of Cooperative Extension, Warner and Christensen (1984) pointed out that the widely accepted singular purpose of Cooperative Extension is a thing of the past and that successful organizational adaptation is dependent upon a common understanding within the agency of what it ought to be in the future to the changing publics.

In some states, Cooperative Extension has looked at the potential of applying strategies successfully used in the profit sector in adapting the organization to its changing publics. The work of a few scholars in marketing for non-profit organizations (Kotler, 1981; Topar and Rosenberg, 1983) has gained widespread attention within Cooperative Extension and spurred some states to draw upon this work to improve organizational adaptation. Extension organizations that want to be adaptive are turning to more systematic planning as a managerial process of developing a strategic fit between the organization's goals and resources and its changing marketing opportunities.

This paper describes one state's effort to achieve common expectations for overall organizational mission and purpose among diverse Cooperative Extension faculty in the initial phase of a strategic planning effort for the development of the 1988-91 long-range Extension program. The major objectives guiding this effort were that the Cooperative Extension faculty would

(1) develop an increased understanding of the dynamic population and the major trends impacting on the people in the state.

(2) review and sharpen understanding of mission and purpose in light of the population dynamics and trends presented.

(3) collectively, come to a common position of organizational mission, audiences to be served, and capabilities to address the needs of this state.

Methodology

Preparation for this planning effort began with the careful development of a total long range planning strategy (FOCUS '91) that included the following five phases: (1) a state conference focusing on environmental scanning and organizational mission and capabilities, (2) program area

conferences focusing on state and national trends and issues related to the program area, (3) district conferences with all county faculty reviewing county situational analysis and problems identified, (4) regional work sessions to design programs and develop plans of work through agent/specialist design teams, and (5) development of promotional strategies for county and state programs.

The first phase of FOCUS 91 included a statewide conference designed for all Extension faculty including administration, specialists, and county faculty. The expected outcomes of this conference were that Extension faculty would have a better understanding of this state's dynamic population and collectively come to a common position on what Extension's future organizational mission and capabilities should be to address this population in the 1988-91 program.

The conference was divided into two parts. The first part included one and one-half days devoted to general sessions featuring resource speakers recognized statewide for their expertise in six (6) areas of trends (environmental, economic, social, political, technological and educational) impacting on the population of this state,and one additional general session devoted to state demographics.

The second part of this conference was designed for group analysis of organizational mission, Extension audiences, competition and organizational capabilities and the development of organizational positions relative to these topics. These tasks were accomplished through use of the American Assembly format, which is a technique designed to facilitate functioning of group work expected to accomplish a specific task over several working sesssions where continuity of group participation is required. In preparation for the tasks, this format required participants to invest time in reviewing a pre-conference document of materials and provocative questions related to organizational issues facing the participants in the conference. Upon reviewing these, County Directors and Department Chairmen were asked to hold county and/or departmental discussions relative to the questions raised in the document and come prepared to participate in the group sessions.

The 510 conference participants were organized into 20 groups of approximately 25 persons per group. Groups were structured so that each group represented a cross-section of administration, county faculty, and state faculty. A group leader and reporter were appointed for each group and explicit instructions were given during training prior to the conference.

One-hour group work sessions were conducted on each of the four topics in the following sequence: organizational mission, target audiences, competition and organizational capabilities. Following completion of group sessions, recorders in each of the 20 groups sessions compiled discussion notes into one report that was developed into a position statement by the designated anchor person for each topic. Position statements on each of the four topics were prepared, duplicated on the last evening of the conference and distributed to all participants following the presentation of the position statement in the closing general session on the next morning.

Approximately one month following the conference, a questionnaire was mailed to all conference participants asking their assessment of how well the objectives for the conference were met. A response rate of 53 percent (274) returned questionnaires was obtained.

Results

Results from the three broad objectives guiding this effort are briefly presented as follows.

Objective 1 - Develop an increased understanding of the dynamic population and the major trends impacting on the people in the state.

On a scale of 1 (poor) to 5 (excellent), responding faculty rated the conference 4.1 on helping faculty develop an increased understanding of the changing population and trends in the state. Agricultural faculty responded with the lowest rating of 3.9. (See Table 1). Representative comments by faculty included: "Excellent for urban trends but poor for agriculture"; "It would have been helpful if we had agricultural figures"; "The statistics on our clientele were extremely interesting and useful"; "I would never have guessed our state looks like this demographically"; "Some traditional faculty will always have a hard time relating to these data"; "Highlight of conference was the different perspectives provided on our state"; "The demographic data, statistics were fascinating."

Table 1 Faculty Assessment of How Well Conference Met Objective to Increase Understanding of the Changing Population and Major Trends in the State

		Poor 1	2	3	4	Excellent 5	$\bar{x}$
Agriculture	(n=141)	1(1)	10(7)	26(18)	68(48)	36(26)	3.9
Home Economics	(n=68)	---	2(3)	6(9)	29)43)	31(46)	4.3
4-H	(n=26)	---	---	3(12)	14(53)	9(35)	4.2
Marine	(n=10)	---	---	2(20)	3(30)	5(50)	4.6
Administration	(n=17)	---	---	1(6)	5(29)	11(65)	4.6
Other	(n=12)	---	---	---	8(67)	4(33)	4.3
Total	(n=274)	1(-)	12(4)	38(14)	127(46)	96(35)	4.1

Objective 2 - Collectively review and sharpen understanding of mission and purpose in light of the population dynamics and trends presented.

Responding faculty rated the effort toward achieving this objective 3.5 on a scale of 1 (poor) to 5 (excellent). As in objective 2, agricultural faculty responded with the lowest rating (3.1). Representative comments included "We have an identity problem among ourselves and with the public"; "No one told us where agriculture fits in"; "Extension's mission was sharpened but definition was not focused"; "Some faculty are so defensive about social trends"; "Well done, a healthy exercise for faculty who share differing perspectives of similar problems and possible solutions"; "Not all faculty recognize the worth of other program areas."

Table 2 Faculty Assessment of How Well Work Sessions Helped Them to Sharpen Understanding of Mission and Purpose.

		Poor 1	2	3	4	Excellent 5	$\bar{x}$
Agriculture	(n=141)	4(3)	30(21)	47(33)	47(33)	13(9)	3.1
Home Economics	(n=68)	1(1)	6(9)	13(19)	28(41)	20(29)	3.9
4-H	(n=27)	___	4(15(	2(7)	19(70)	2(7)	3.7
Marine	(n=10)	___	___	5(50)	4(40)	1(10)	3.6
Administration	(n=17)	___	2(12)	4(24)	8(47)	3(18)	3.7
Other	(n=12)	1(8)	1(8)	6(50)	1(8)	3(25)	3.3
All	(n=275)	6(2)	43(16)	77(28)	107(39)	42(15)	3.5

Objective 3 - Collectively come to a common position on organizational mission, audiences to be served, and capabilities to address the needs of people in their state.

The responding faculty's average rating of the effort toward reaching objective 3 was 4.1 on a rating scale of 1 (poor) to 5 (excellent). As in objectives 1 and 2, agricultural agents' rating of 3.8 was the lowest. Representative comments included: "A lot of data not applicable to agricultural agents. The most useful part was interacting with other agents"; "Could use more data about agricultural people, their make-up and problems"; Emphasis seemed to be on urban problems where more data is available"; "If agricultural people are only 5 percent of the population, are we a dying business?" "Conference provided a forum for exchange of information between all faculty in the state." "Fine opportunity afforded

for better understanding of problems and scope of total Extension programs"; "Best team spirit conference I have ever attended"; "A major step in bringing about a unified Extension faculty--a realization of the importance of both urban and minority audiences to Extension's future"; "Perhaps more time could have been devoted to small group discussions. This was where the real meat of the conference came from."

Table 3 Faculty Assessment of How Well Group Sessions Helped Faculty to Collectively Come to Common Position on Mission, Audiences, and Capabilities.

		Poor 1	2	3	4	Excellent 5	$\bar{x}$
Agriculture	(n=141)	4(3)	13(9)	34(24)	47(33)	42(30)	3.8
Home Economics	(n=68)	---	3(4)	9(13)	27(40)	29(43)	4.2
4-H	(n=27)	---	2(7)	6(22)	11(41)	8(30)	3.9
Marine	(n=10)	---	1(10)	1(10)	5(50)	3(30)	4.0
Administration	(n=17)	---	---	---	6(35)	11(65)	4.6
Other	(n=12)	---	1(8)	4(33)	2(17)	5(42)	3.9
All	(n=275)	4(1)	20(7)	54(20	98(36)	98(36)	4.1

Observation and Discussion

The results of the survey and observations from group action in the American Assembly procedure are analyzed and summarized for brief review.

The majority of both county and state Cooperative Extension faculty approached the task with diverse interests. Since assigned work groups contained a cross-section of all program areas (agriculture, Home Economics, 4-H, Marine) careful attention was given in all groups to the wording of the Cooperative Extension mission to seek assurance that it supported each participant's assigned program area.

Polarized viewpoints among the faculty at the beginning of the group tasks had the potential to impact negatively on the total organizational effort to collectively come to a common position on mission. Heated discussions of organizational mission occurred consistently across all groups. As one participant described his session, battle lines were drawn and the battle began. Discussions of worthiness or importance of program areas arose in relation to scarce resources and funding issues.

Across all groups, both the initial reactions of participants and the subsequent reactions as they worked through the group tasks followed Kotler's (1982, p. 79) predicted organizational responses to change. Kotler predicts that when challenged, organizations usually respond in the following four ways.

(1) Denial - The organization denies that any real change is occurring and refuses to recognize that new strategies may need to be developed for the future of the organization.

Both the consistently lower ratings by the agricultural participants of the Conference, and their statements challenging the value of the organization's use of its resources to look at the population dynamics of this state exemplified this denial form of responding.

(2) Opposition - The organization can try to fight or reverse the unfavorable development.

While some participants chose to deny that any real threat existed to their traditional way of viewing the state, others tried to change their traditional position and encourage the organization to change to meet new clientele needs. Consistently high ratings by Home Economics agents, marine agents, and youth agents and ingratiating comments regarding what their program area could offer the changing people of the state typified this opposition response.

(3) Modification - The organization tries to modify its characteristics so that it is more effective in the new environment.

As the focus of the discussion sessions moved from the question of mission to the question of audiences that the Extension organization should be addressing, some modification in strongly held positions regarding program areas occurred. Characteristics of potential program structures to address changing clientele needs began to emerge and appear more attractive to the group. References to team work and each program area needing the other to address changing audiences was noted.

(4) Relocation - The organization can try to stay the same but shift its services to a more compatible environment.

As the groups moved on to discussions of organizational capabilities, groups generally concluded that Cooperative Extension basically has a sound broad mission that allows us to address changing clientele needs, but that our application of this mission needs to be broadened to include new audiences with different needs and that changes in our interpretation of the mission are needed to make Extension more relevant in the state today. They noted that the proliferation of needs and limited available resources require prioritizing critical issues and developing interdisciplinary team approaches to addressing needs.

Through the group process, groups were beginning to reach a common understanding of mission and purpose, potential audiences and organizational capabilities across all program areas. They generally concluded that stronger Extension results can be anticipated if a common understanding and purpose is held by all Extension faculty. Immediate verbal feedback at the close of the conference indicated that the majority

of conference participants left with a renewed sense of purpose and challenged to move ahead in the remaining FOCUS 91 phases.

The results of this effort by one state indicate it is possible among Extension faculty with diverse interests to build a common understanding of mission and purpose. However, this is dependent on a task-oriented system developed by peers and administrators to facilitate this process. It also requires an overall open administrative leadership willing to risk both resources and the anxiety of participants as groups struggle to achieve this common goal.

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